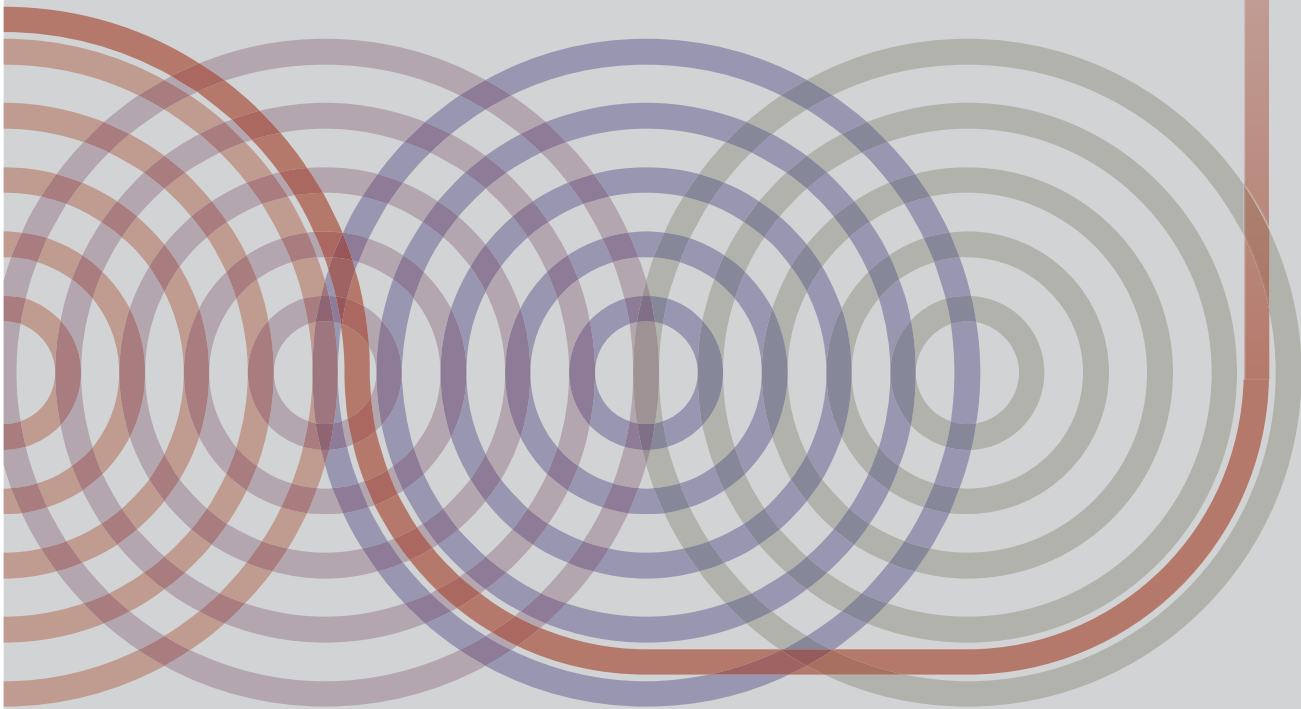


Trends and Issues Report



Frederick County, Maryland

April 2008




This Trends and Issues Report documents various development data and other background data to identify trends since the previous Countywide Comprehensive Plan was adopted in 1998. It represents the initial step in the process of updating the Countywide Comprehensive Plan. With a better understanding of where the County has been in the previous ten years we can better address the issues the County will be facing during the next ten or more years. It should be noted that much of the background data goes back beyond 1998, where the data is available, to provide a longer history and further identify the trends.

This report organizes the trend and background data under the following categories:

- Development Data
- Population
- Agricultural and Rural Area Activity
- The Economy
- Traveling and Commuting
- Infrastructure and Community Facilities

At the end of the report is the identification of issues that have been derived from the background data and trends as well as from staff discussions. The issues in this report are not meant to be an exhaustive list, as additional issues are expected to be identified through



the various public participation and outreach opportunities, as well as through the development of a Draft Plan with the Planning Commission.

This Trends and Issues Report is not an exhaustive list of the various data and information available regarding planning in Frederick County. Please check the Division of Planning website at <http://www.co.frederick.md.us/planning> for more information.

Some of the additional information available includes:

- "A Demographic Exploration of Frederick County" Articles - Monthly reports published in the Planning Newsletter. The articles cover a wide range of topics from the US Census and the Division of Planning data.
- Age Restricted Community Report - Trends and Issues of the Aging Population in Frederick County 2006.
- Comprehensive Pupil Yield Study 2005 - A report dedicated to studying how many students are created from certain types of development.
- Industrial and Commercial Land Inventory 2006 - A study conducted to inventory all of the commercial lands in Frederick County.
- Population Estimates and Projections
- Permit Reports and Development/Subdivision Data
- Demographic Profiles, other Publications and Special Reports



List of Graphics

Total Dwellings Permitted: 1995-2007

Total Dwellings Permitted By Housing Type: 1995-2007

Approved Residential Development Pipeline
Summary

Lots/Dwellings in Traditional Pipeline: Municipalities
Versus County

Lots/Dwellings in Traditional Pipeline: Frederick City
Versus Other Municipalities

Lots/Dwellings Pending APFO Approval: Eaglehead
Versus All Other County

Projected Residential Land Needs Analysis

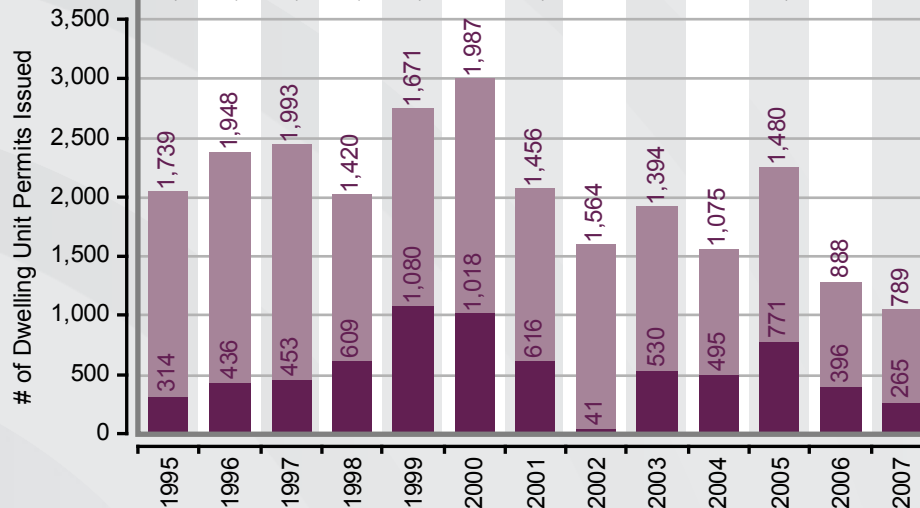
Commercial Permits Issued: 1997-2007

Commercial and Industrial Construction

Total Building Permits for Residential Dwellings

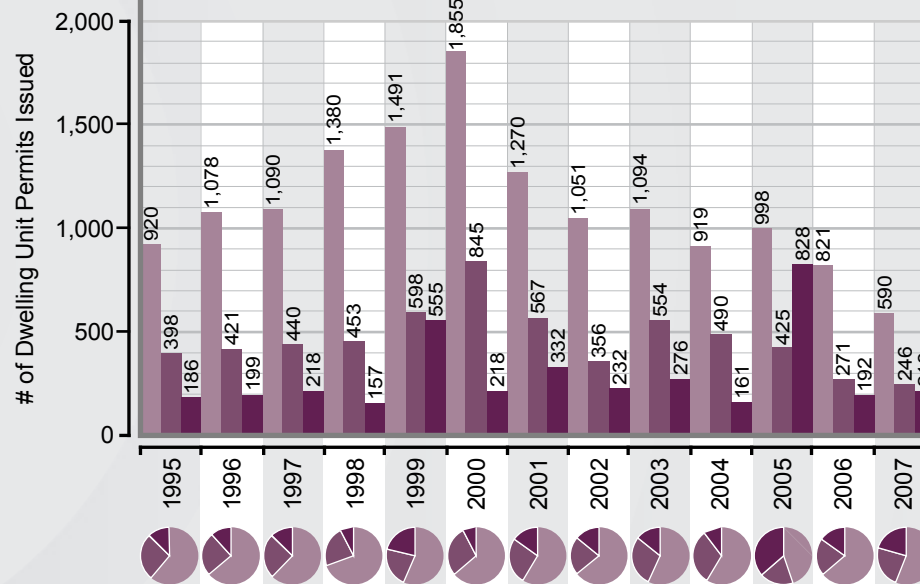
Total Dwellings Permitted: 1995-2007

Overall Totals



County & Municipalities
Frederick City
Source: Frederick County
Division of Planning

Total Dwellings Permitted by Housing Type: 1995-2007



Multi-family
Townhouse/Duplex
Single Family*
*Includes Mobile Homes
Source: Frederick County
Division of Planning



Housing Construction

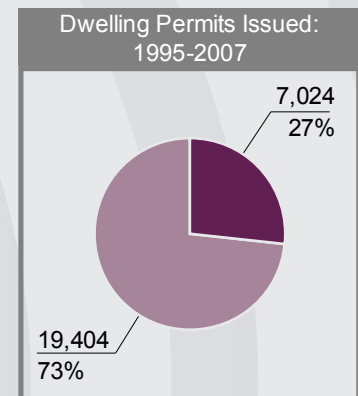
- Since 2000 the County has averaged approximately 1,800 new dwellings per year. This is a slight decline from an annual average of 2,000 dwellings/year through the 1990's.
- Some of the continuing decline since 2005 is attributable to residential market conditions that are expected to continue for the next several years. Building levels of 1,000 to 1,200 dwellings per year have not been seen in the County since 1981-1982.
- Projections for 2030 show the County having an additional 38,700 households/dwellings, which is an average of 1,500 dwellings/year. This compares to an average of 1,900 dwellings/year for the previous 25-year period from 1980 to 2005.
- The predominant housing type constructed in the County continues to be single-family detached. Historically, 60% of all new dwellings constructed were single-family detached.
- The projected trend for the near future reveals that the relative amount of single family detached dwellings will decline, resulting in an estimated housing mix of 50% single family detached dwellings, 30% townhouse and duplex dwellings, and 20% multi-family dwellings.

Moderately Priced Dwelling Units

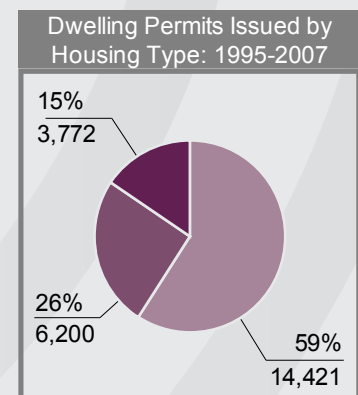
- In November 2002, Frederick County initiated a Moderately Priced Dwelling Unit Program. Currently, there are over 1,300 units in 15 projects with some type of development approval.

Age-Restricted Development

- Since about 2000 Frederick County has experienced an increase in proposed age-restricted (age 55+) residential developments. The increase in these developments can be attributed to the increasing Baby Boomer age group and to APFO school capacity constraints that would not allow conventional residential developments to be approved.



County & Municipalities
Frederick City
Source: Frederick County
Division of Planning



Multi-family
Townhouse/Duplex
Single Family*
*Includes Mobile Homes
Source: Frederick County
Division of Planning



The Pending Supply of Residential Development as of April 1, 2008

Approved Residential Development Pipeline Summary				
Lots / Dwellings				
	Traditional Pipeline	Recorded Lots / Dwellings Available	Unrecorded Pass APFO	Pending APFO
*Municipalities	8,205	3,151	4,041	1,013
County	16,663	3,085	5,152	8,426
Total	24,868	6,236	9,193	9,439

Lots / Dwellings in Municipalities*				
*City of Frederick	5,755	2,808	2,090	857
Other Municipalities	2,450	343	1,951	156

Lots / Dwellings in County				
Eaglehead / Lake Linganore	6,525	982	238	5,305
Remainder of County	10,138	2,103	4,914	3,121

Traditional Pipeline: Dwelling Units Approved less the number of Building Permits Issued.

Dwelling Units Approved: Includes units approved at the Preliminary Plan or Phase II PUD Plan stage.

Unrecorded Pass APFO: The number of lots in a subdivision which have not yet been recorded but have passed the APFO.

Pending APFO: The number of lots in a subdivision which have not passed the APFO.

Source: Frederick County Division of Planning April 2008

*Note: Updated City of Frederick Data was not available in the County Pipeline Format at the time this report was finalized. As data is received, future versions of this report and this information will be updated accordingly.



- The County (not including municipalities) currently has ten (10) age-restricted projects with some level of development approval. These projects propose a total of 5,525 dwellings. Five of the projects are wholly or part of larger Planned Unit Development (PUD) developments.

Residential Development Pipeline

The preceding information describes how many residential lots/dwelling units have already received some level of development approval but are not yet built. These lots/dwellings units are commonly referred to as the “pipeline”. The pipeline data captures residential developments approved under the County’s jurisdiction as well as by the municipalities.

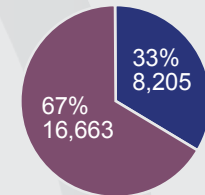
Under the County’s jurisdiction the pipeline includes any lot created for residential use including those zoned Agriculture and Resource Conservation in addition to developments zoned residential, Planned Unit Development (PUD), or Mixed Use Development (MXD).

Pipeline data is also provided for the municipalities with a breakdown between the portions of the pipeline just within the City of Frederick compared to the other eleven municipalities.

- The 24,868 lots/dwellings in the traditional pipeline could accommodate the County’s residential growth for approximately 14 years based on a construction build-out rate of 1,800 dwellings/year.
- The City of Frederick and the Lake Linganore community alone accounts for almost half (49%) of the County’s total traditional pipeline.
- The Frederick, New Market, and Urbana planning regions account for over 82% of the County’s traditional pipeline with the Thurmont and Walkersville regions having fewer than 550 lots/dwellings in the pipeline.

Lots/Dwellings in Traditional Pipeline

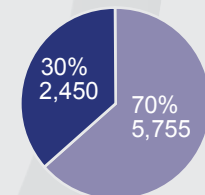
Municipalities Versus County



- Municipalities
- County

Lots/Dwellings in Traditional Pipeline

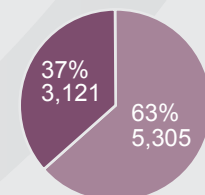
Frederick City Versus All Other Municipalities



- City of Frederick
- Other Municipal

Lots/Dwellings Pending APFO Approval

Eaglehead Versus All Other County



- Eaglehead Units
- Other County Units



Projected Residential Land Needs Analysis

Part 1: Projected Dwellings Needed to 2030

Projected 2030 Population:	326,224	Projected Additional Population 2007-2030 ¹	94,276
Current 2007 Population:	231,948	Projected 2030 Household Size ²	2.59
Current Household Size:	2.72	Gross Dwellings Needed	36,400
Current House Type Mix ⁵ :	60% SF 25% TH 15% MF	Dwellings in Pipeline ³	24,868
		Net Dwellings Needed	11,532

Part 2: Projected Acreage Needed to 2030

Dwelling Type	Unit Mix ⁴	Total Dwellings Needed by Type	Density Scenarios					
			Low		Mid		High	
			Dwellings Per Acre	Acres Needed	Dwellings Per Acre	Acres Needed	Dwellings Per Acre	Acres Needed
Single Family	50%	5,766	2	2,883	3.5	1,647	5	1,153
Townhouse	30%	3,460	5	692	7	494	10	346
Multi-Family	20%	2,306	10	231	12	192	15	154
Totals		11,532		3,806		2,334		1,653
			dwellings	acres		acres		acres

(1) Metropolitan Washington Council of Governments Round 7 Cooperative Forecasts

(2) U.S. Census

(3) Frederick County Division of Planning, includes municipalities

(4) Projected Mix from Frederick County FY 2008-2014 Capital Improvements Program

(5) SF: Single Family Dwellings, TH: Townhouses, MF: Multi-Family Dwellings



Projected Residential Land Needs

The analysis on page 8 uses the projected population for the County by 2030 to project an approximate amount of acreage needed to accommodate the population growth. This information will provide guidance in assessing the community growth areas to determine if the development potential is too great compared to the County's projected needs or perhaps too small.

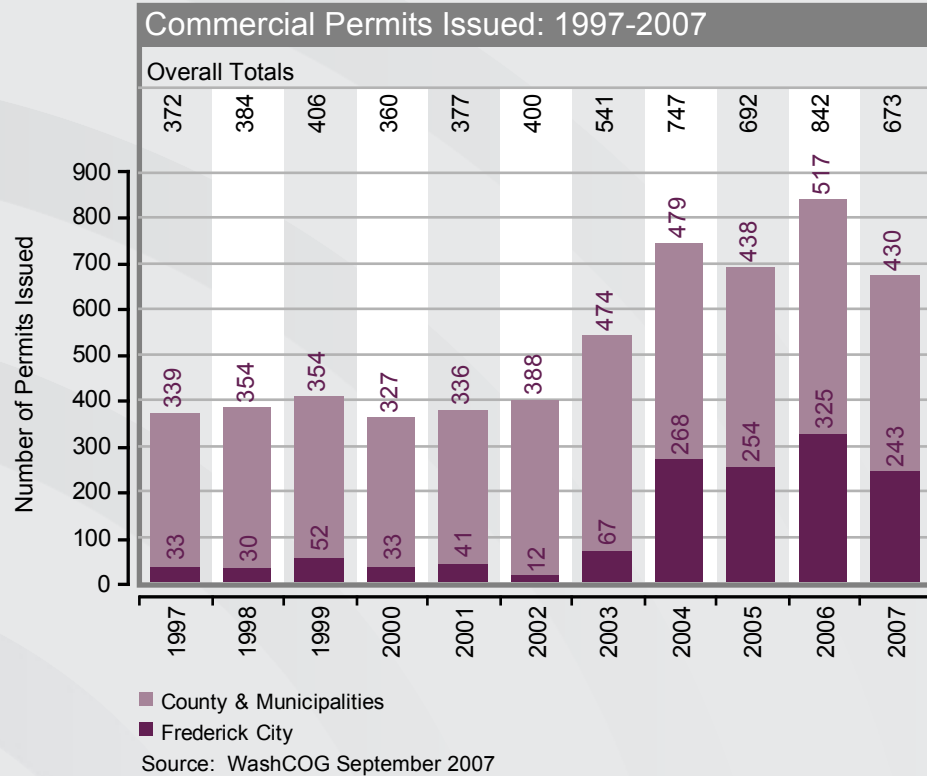
Part 1 of the analysis starts with the projected increase in population from 2007 to 2030. This projection is taken from the Metropolitan Washington Council of Governments Cooperative Forecast process, and specifically the Round 7.0 forecasts that were prepared in 2005. By applying a household size of 2.59 persons/household to the projected population increase of 95,106 results in a need for approximately 36,400 dwellings.

From the 36,400 dwellings we would subtract the number of residential dwellings that are already part of approved developments but not yet built i.e. the pipeline. As of January 2008 there were approximately 24,868 dwellings in the pipeline including both County and municipal developments. This results in a net dwelling unit need of approximately 11,532.

Part 2 of the analysis takes the net dwellings needed to determine how many acres of land would be needed to accommodate 11,532 dwellings. This analysis applies several density scenarios, low – mid – high, to derive the approximate number of acres needed. All of the density scenarios assume a mix of 50% single-family detached, 30% townhouses, and 20% multi-family. The density scenarios are not based on any identified trends in the County but are just to illustrate the range of acreage needs that would be needed to accommodate the 11,532 dwellings. The resulting range of 1,653 – 3,806 acres represents the approximate amount of vacant land needed



Commercial and Industrial Development Activity



Commercial and Industrial Construction ¹						
	2005			2006		
	Projects	Square Feet	Value (thousands)	Projects	Square Feet	Value (thousands)
Retail	18	327,004	\$25,346	20	356,051	\$30,877
Office	9	235,938	\$10,892	11	699,559	\$119,028
Ed. & Med.	8	449,521	\$59,700	12	739,353	\$140,566
R&D	4	305,418	\$27,800	6	1,036,460	\$713,230
Mixed Use	0	0	\$0	0	0	\$0
Hotel/Motel	0	0	\$0	2	95,000	\$11,000
Other	29	1,331,949	\$108,995	46	2,899,846	\$210,999
Total	68	2,649,830	\$232,733	97	5,826,269	\$1,225,700
Cost/SF			\$88			\$210
SF/Project		38,968			60,065	

Source: WashCOG September 2007

(1) Includes Frederick County and Municipalities



beyond the amount of land already developed or with approved residential developments.

Further analysis will be conducted beyond this report to examine existing capacity (from a land use/zoning perspective) for the various growth areas and municipalities, (i.e. How can the existing land use accommodate projected needs?, Can we reduce the needed acreage through identifying areas for redevelopment potential?)

Mixed Use Development

- Even though the County has had a Mixed Use Development (MXD) zone since 1993 it has not been used extensively until the past several years. The MXD zone is applied on Limited Industrial (LI) and Office/Research (ORI) designated land and permits a mix of residential and commercial uses with the primary focus still on employment uses.
- Since 2005 the County has approved three MXD projects that include a residential component. These projects propose a total of 1,700 dwellings, all townhouses and multi-family. The MXD zone does not permit single-family detached dwellings.
- In the past, the County has not always accounted for residential development potential in the LI and ORI zones that could be zoned MXD. Specific targeted areas for and MXD project may be beneficial in controlling which ORI and LI land is converted.





List of Graphics

Agricultural Preservation - Total Acres: 1975-2007

Agricultural Preservation - Total Farms: 1975-2007

Total Acres Preserved: 1975-2007

Total Farms Preserved: 1975-2007

Table - Total Number of Acres Developed: 1992-2007

Table - Total Number of Lots Recorded: 1992-2007

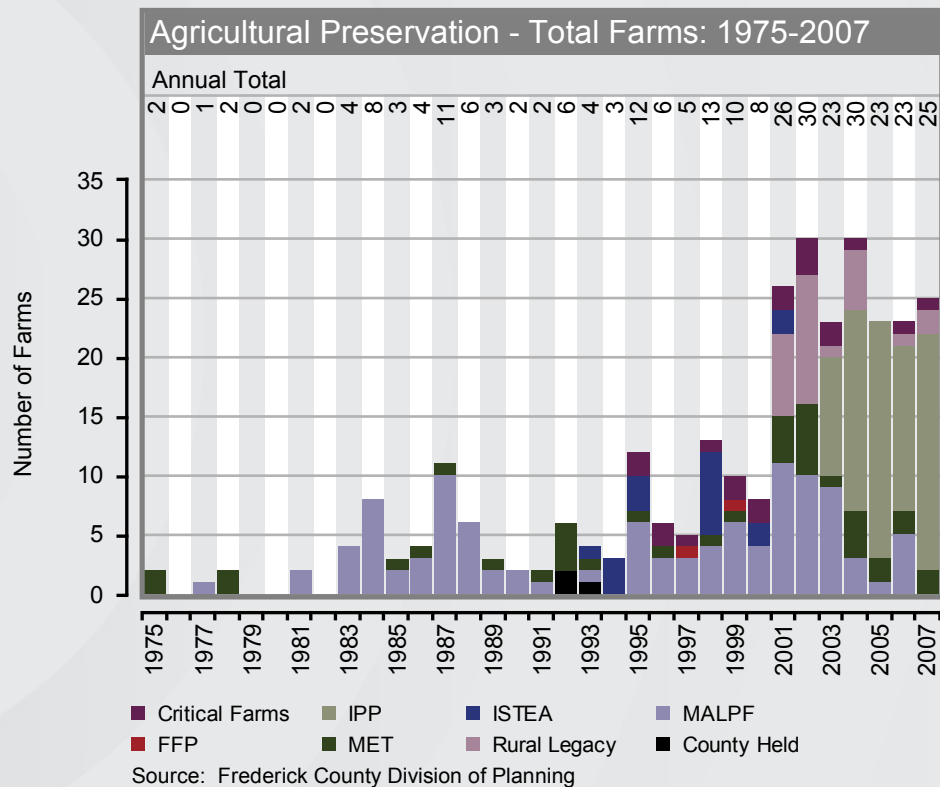
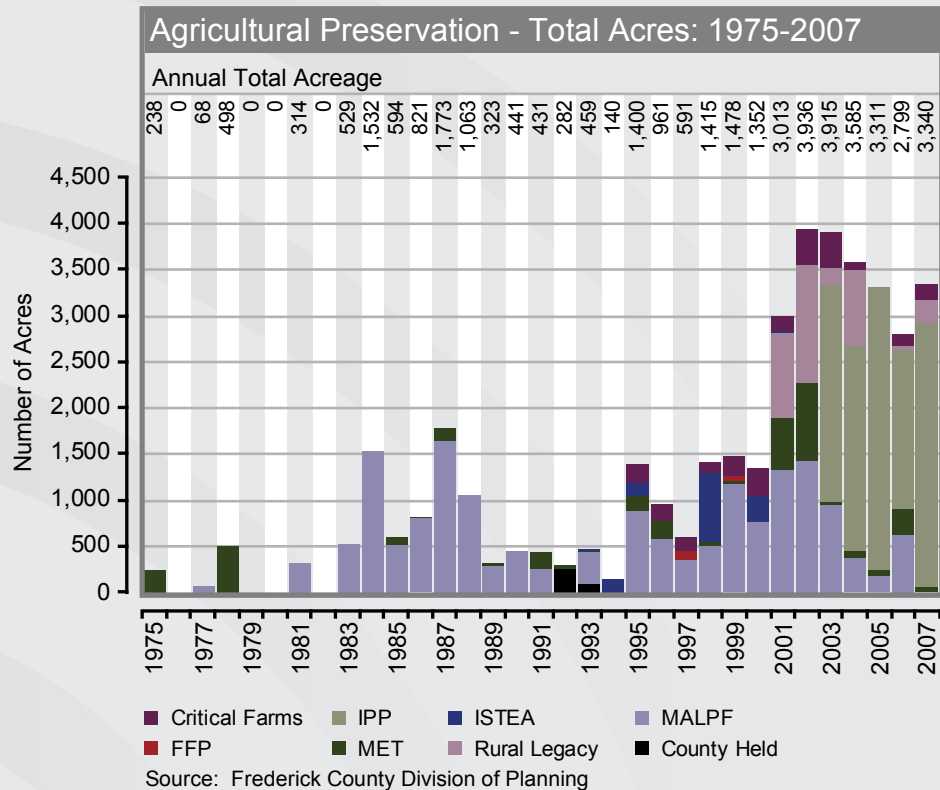
Pie Chart - Total Number of Acres Developed: 1992-2007

Pie Chart - Total Number of Lots Recorded: 1992-2007

Table - Total Residential Dwelling Permits in All Zones Versus Lots Created in the Agriculture Zone

Pie Chart - Total Residential Dwelling Permits in All Zones Versus Lots Created in the Agriculture Zone

Agricultural Preservation: Farms and Acres



Agricultural Characteristics

Frederick County ranks among Maryland counties for the following activities:

- #1 in the number of farms (1,200 total farms, including preserved and not preserved) within a county
- #1 for milk production, hay production (in tons), and corn for silage (in tons)
- #2 for the number of equine facilities (2,180) and the number of acres used solely for equine purposes (22,000 acres)
- #3 for the number of horses (8,290) and in wheat production (in bushels)
- #4 in barley production (in bushels)

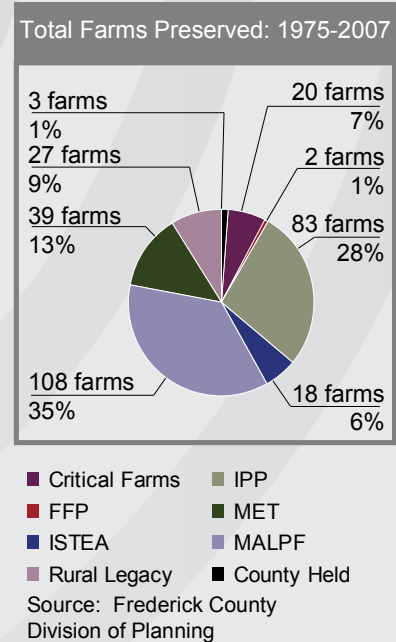
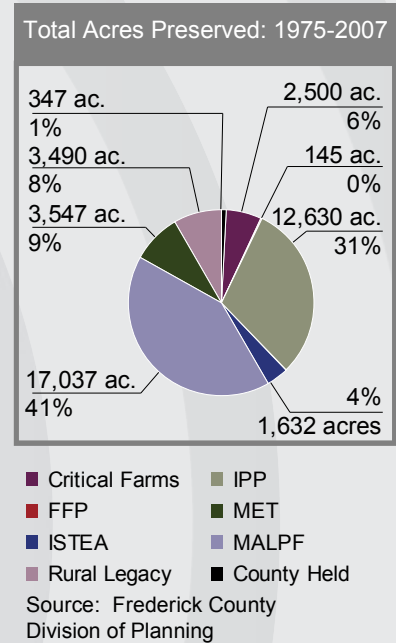
Dairy farming continues to be a significant component of the County's agricultural economy, with the County ranking within the top 75 of counties, nationally, in dairy production. There are approximately 122 dairy operations within the County.

The County's agriculture is becoming more diversified with the development of value added operations, which include wineries, greenhouse/plant nurseries, on-farm processing, and agritourism operations.

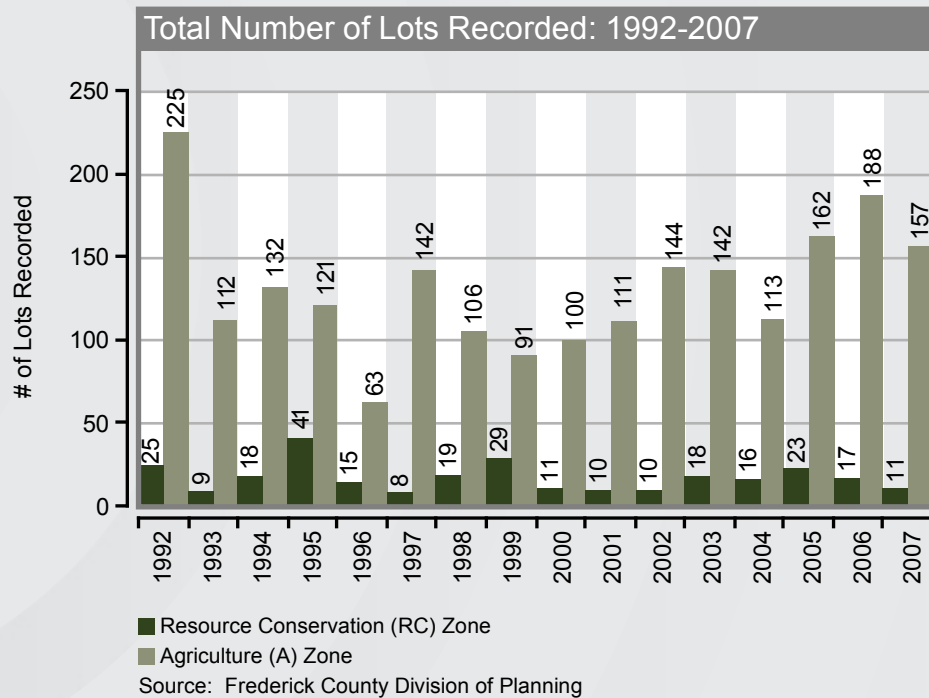
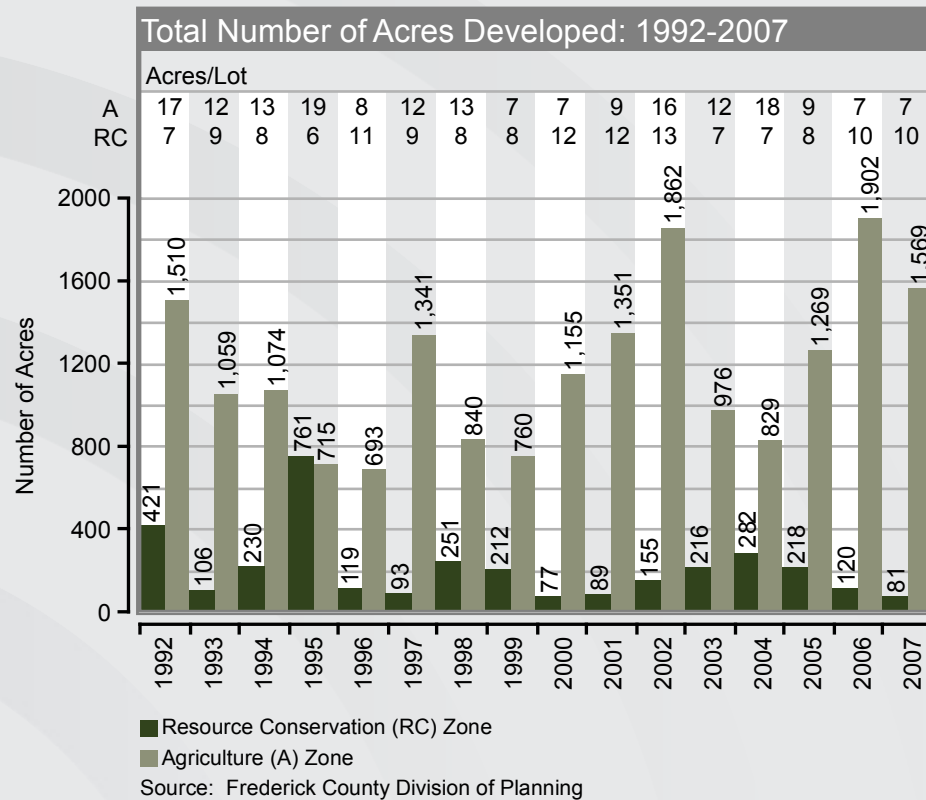
Agricultural Preservation

Frederick County has been active in farmland preservation since 1975 when the County initiated its Agricultural Preservation Program to administer the State's Maryland Agricultural Land Preservation Program (MALPF).

- Through MALPF and other County, State, and Federal land preservation programs the County currently has 38,394 acres (through 2007) that are permanently preserved through the purchase of development easements. There are an additional 6,350 acres under the MALPF District agreements, which make these properties eligible to sell their development easements.



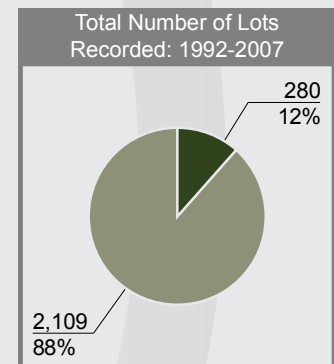
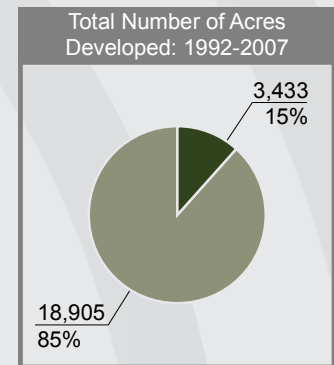
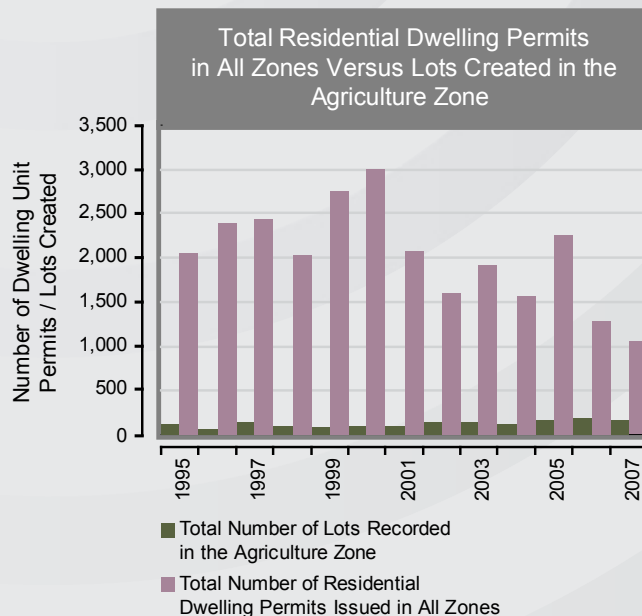
Development Activity in the Agricultural (A) and Resource Conservation (RC) Zones



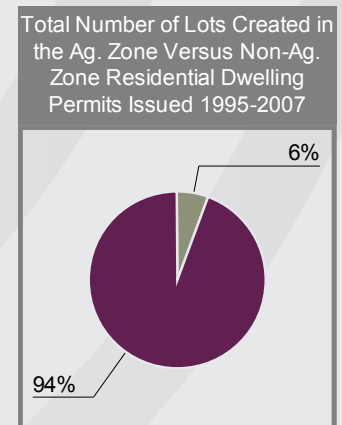
- Since 2001 the County's preservation activity has significantly increased due to the State's Rural Legacy program (2001) and adoption of the County's Installment Purchase Program (IPP) in 2002.
- Since 2001 the County has preserved an average of 3,400 acres of farmland per year.
- Based on this average it would take another 18 years for the County to achieve its goal, set in 1998, of preserving 100,000 acres.

Development Activity in A and RC Zones

The comparison of lots created in the Agriculture (A) zone with residential building permits issued is based on the assumption that agricultural lots will contain one residential dwelling. The vast majority of agricultural lots are created for a single dwelling, however certain lots in the A zone are simply created for agricultural activity purposes.



■ Resource Conservation (RC) Zone
■ Agriculture (A) Zone
Source: Frederick County Division of Planning



■ Total Number of Lots Recorded in the Agriculture Zone
■ Non-Ag. Zone Residential Dwelling Permits Issued
Source: Frederick County Division of Planning



Contents

Actual and Projected Population: 1980-2030

Annual Rate of Population Change: 2000-2006

Actual and Projected Population Comparison

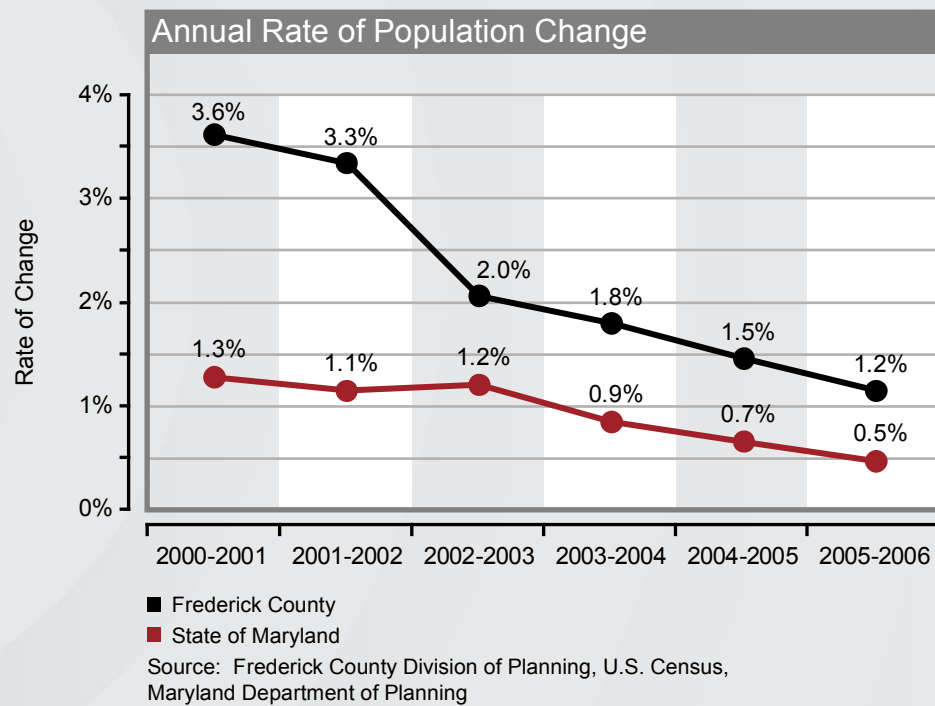
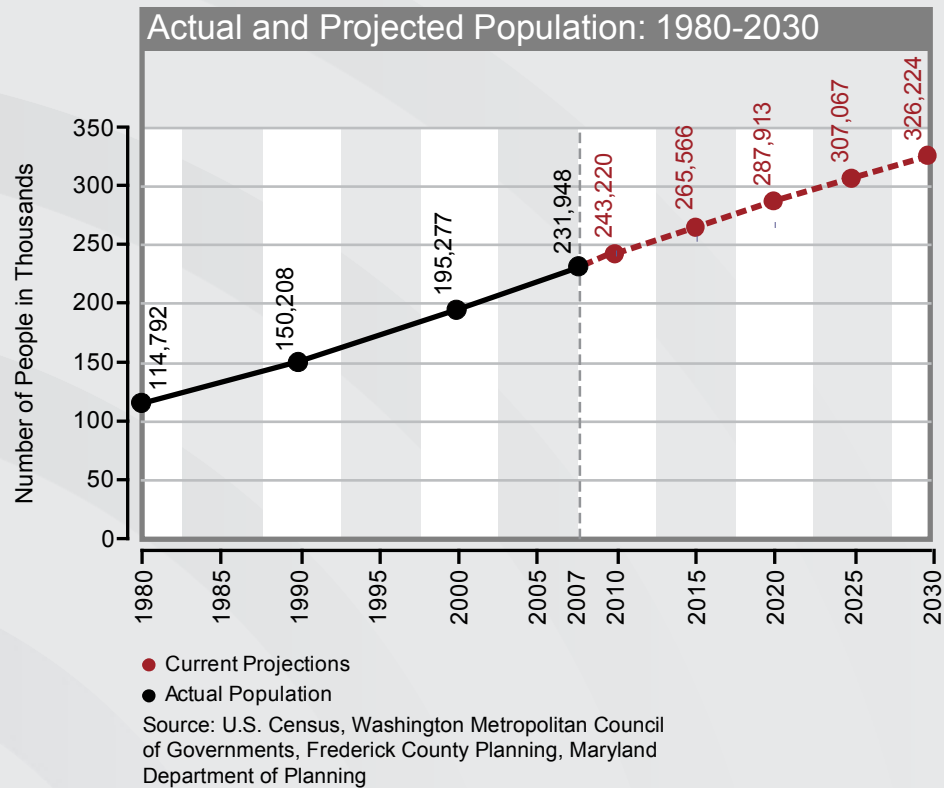
Percent of Total Population in Municipalities

County Versus Municipal Population

Net Natural Increase Versus In-migration: 2000-2006

Percent of Population by Age Group

Population Trends: Projected Growth, and Rate of Change



Population

- Since 2000 the County's population has increased an average of 4,500 people/year.
- For the 25-year period from 1980-2005 the population increased by 106,084 and for the next 25 years to 2030 is projected to grow by 105,348 people.
- In 1990, the population projection for 2010 was 243,600 people. This is on track with current trends. However, the projected rate of growth in the current projections is increased, resulting in a higher population number in 2020 of 287,913 than was projected in 1990, which was 267,100.

Actual and Projected Population Comparison				
	Actual Population ¹	Current Projections ²	1998 Projections ³	1990 Projections ³
1980	114,792			
1985				
1990	150,208			149,125
1995				177,773
2000	195,277	195,277	194,871	203,170
2005	220,743	220,876	216,581	223,845
2007	231,948			
2010		243,220	238,290	243,600
2015		265,566	260,000	255,400
2020		287,913	281,710	267,100
2025		307,067		
2030		326,224		

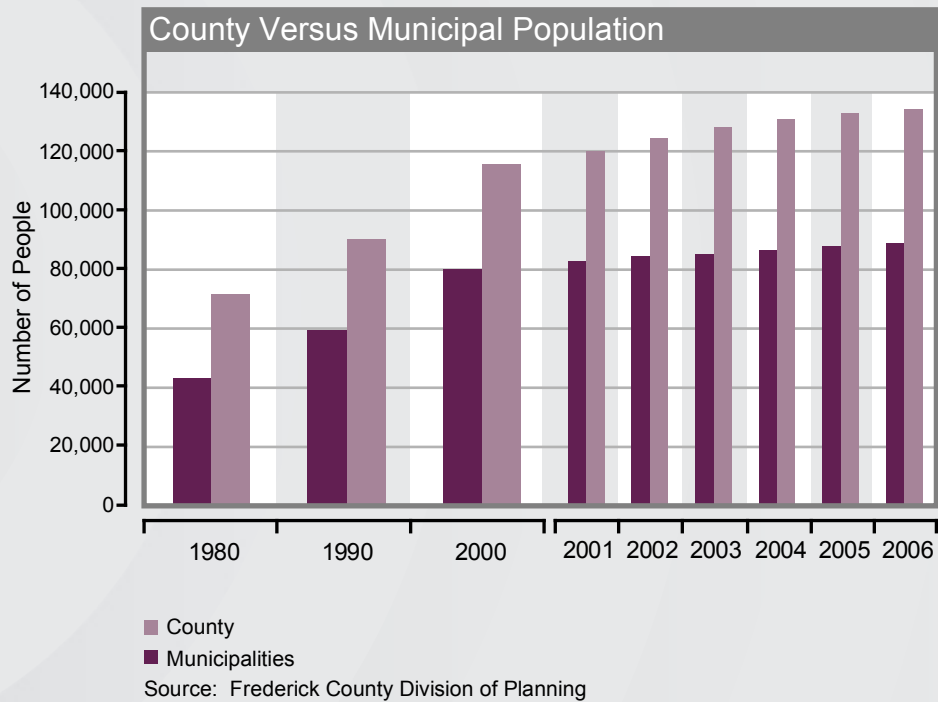
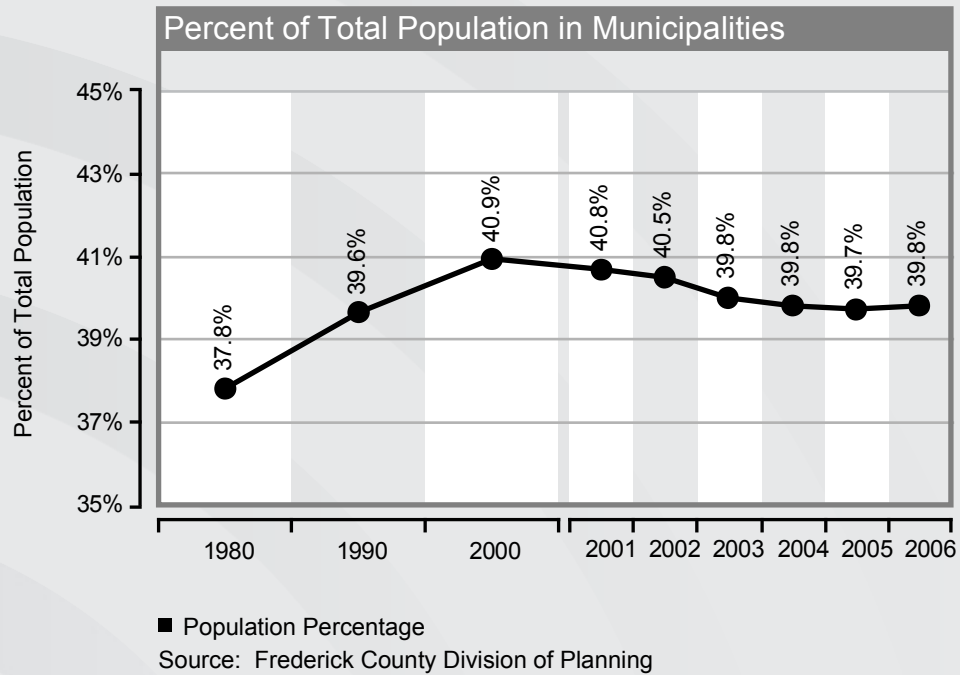
(1) U.S. Census

(2) MWCOG Rd.7 Cooperative Forecast, 2005

(3) Frederick County Planning and Maryland Department of Planning



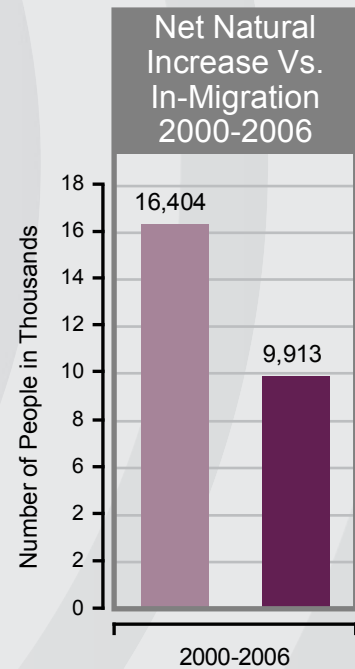
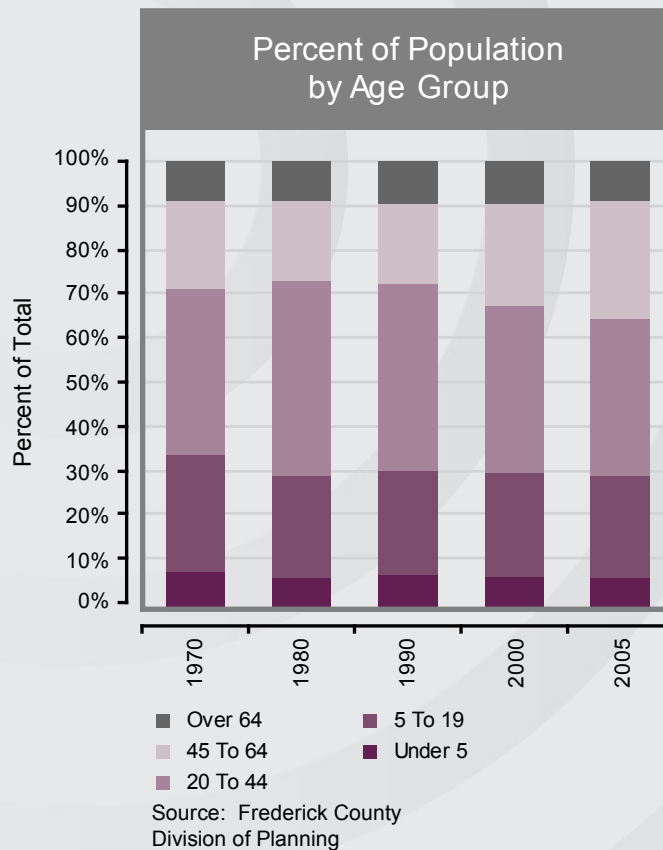
County Population Versus Municipal Population



Municipal/County Distribution of Population

- The percentage of the County's population within all of the municipalities increased from 38% in 1980 to almost 42% in 2000. However, since 2000 the proportion of the population within the municipalities decreased slightly to 40% by 2006.

Population and Growth Characteristics



■ In-Migration
 ■ Net Natural Increase
 Source: Population Division, U.S. Census Bureau, release date March 22, 2007
 Maryland Department of Planning, March 2007





Contents

Historic and Projected Households: 1980-2030

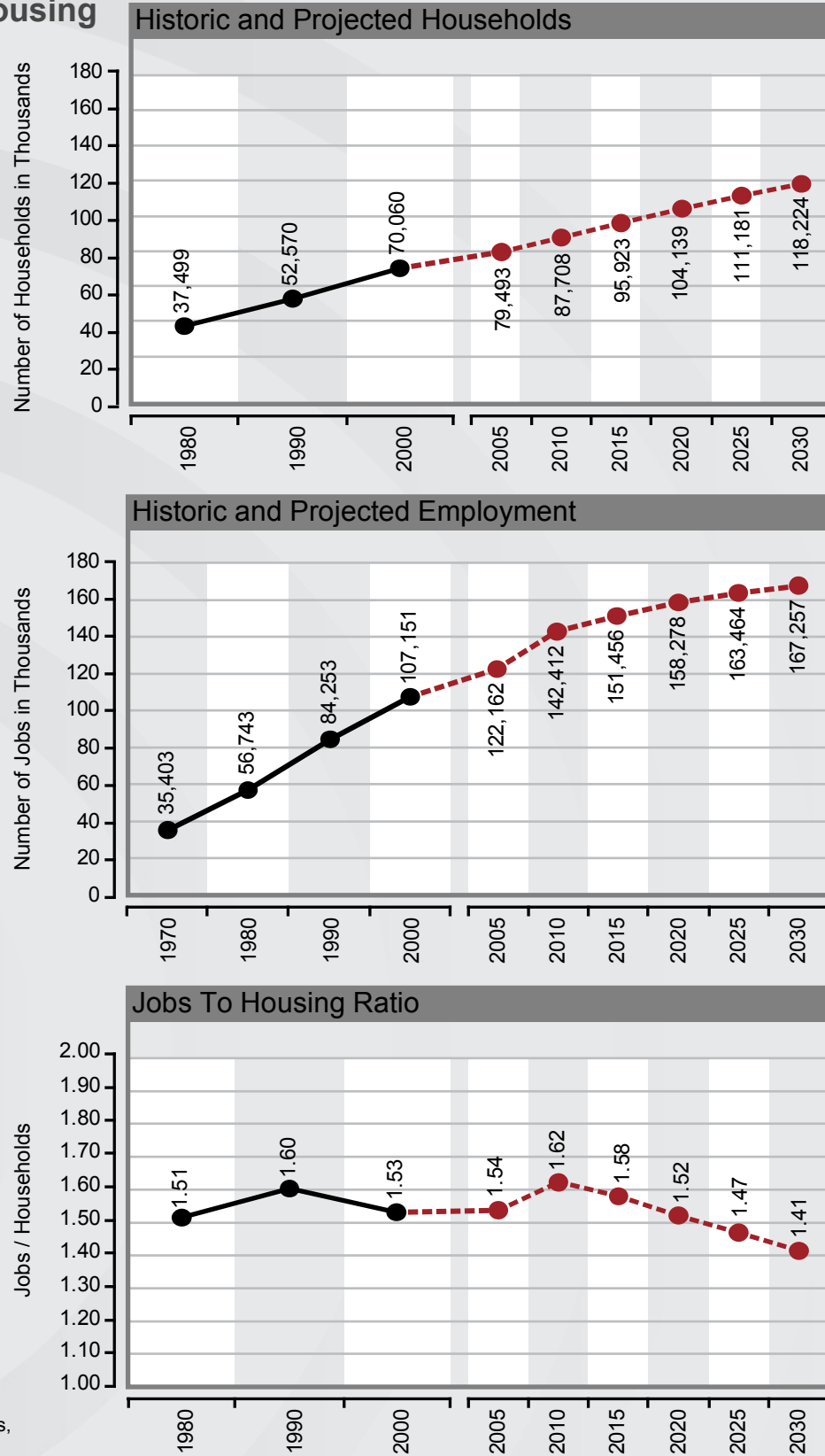
Historic and Projected Employment: 1970-2030

Jobs to Housing Ratio: 1980-2030

Employment by Sector: 1950-2005

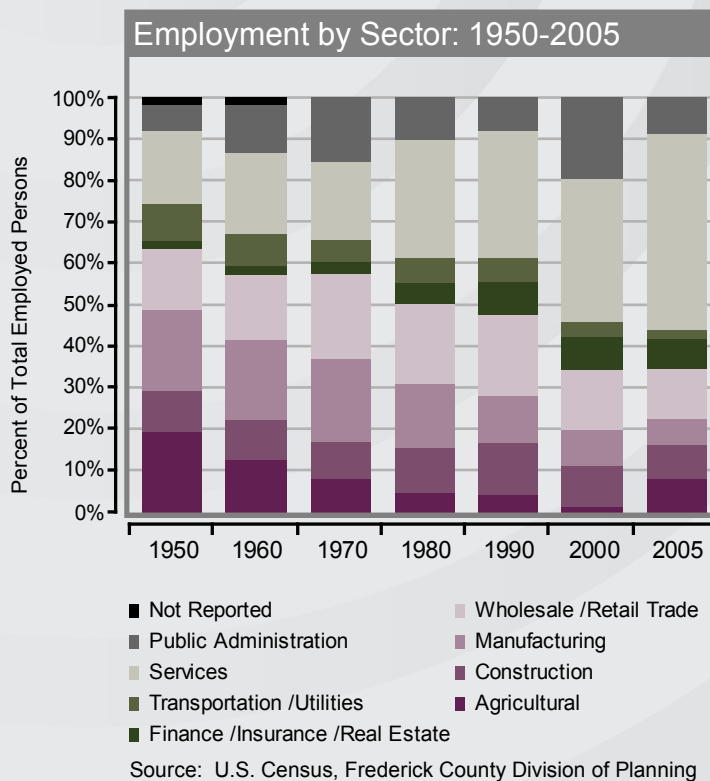
Major Employers of Frederick County

Jobs Versus Housing



Job Growth

- Frederick County continues to maintain strong job growth, which is influenced by its proximity to the Washington metropolitan area.
- Since 2003 Frederick County's job growth has increased an average of 3% per year or about 2,522 new jobs per year.
- In the private sector, the industries that experienced the greatest job growth since 2003 were: Professional and Business Services (31%), Leisure and Hospitality (17%), and Education and Health Services (17%).
- The 1998 Plan has a policy for the County to maintain a minimum job to housing ratio of 1.2:1. Even with a projected decline in the County's job to housing ratio through 2030 the projected ratio will still exceed the current policy ratio of 1.2:1.



Major Employers of Frederick County 2006

Company	# Of Employees
Fort Detrick Campus Army/NCI, Other Tenants	7,900
Frederick County Board of Education	5,384
Frederick Memorial Healthcare System	2,400
Frederick County Government	2,350
Bechtel Corporation	2,050
SAIC	1,670
Wells Fargo Home Mortgage	1,650
United Health Care (formerly MAMSI)	1,565
CitiMortgage	1,300
Frederick Community College	1,141
State Farm Insurance Co.	950
Frederick City Government	851
NVR Building Products	650
Mount Saint Mary's College	600
JP Morgan Chase	575
The National Emergency Training Center	550
BP Solar	500
Home Call	480
Structural Systems	480
Plamondon Companies	410
Cambrex Bio Services Walkersville, Inc.	390
RR Donnelly (formerly Moore Wallace BCS)	380
Invitrogen	300
Hood College	292
Trans-Tech	282
Frederick News-Post	275
Homewood Retirement Center	275
Experient	270
Toys-R-Us	260
Farmers & Mechanics Bank	260
Orgill/Frederick	260
Morgan Keller	256
Richard F. Kline	250
Fountain Rock Management Group Corp	250
BB&T	242
MedImmune	235
Verizon	226
Fannie Mae	225
Stultz Air Technology Systems, Inc	210
Tamko Roofing Products	209
Costco Wholesale	205

Source: Frederick County Office of Economic Development



Contents

Frederick County Transportation Characteristics

Means of Transportation to Work

Vehicle Miles Travelled: 1980-2006

Population: 1980-2006

Vehicle Miles Travelled Per Person: 1980-2006

Commuting Patterns For Frederick and Surrounding
Counties:

Frederick County, Maryland
Adams County, Pennsylvania
Franklin County, Pennsylvania
Washington County, Maryland
Jefferson County, West Virginia
Morgan County, West Virginia
Berkeley County, West Virginia

Vehicle Miles Travelled: 1980-2006

Population: 1908-2006

Vehicle Miles Travelled Per Person: 1980-2006

Transit Ridership

Transportation and Commuting

Frederick County Transportation Characteristics

	Commuting Population		
	1990	2000	2006
Total Population	150,208	195,277	228,364
Total Population 16 or Older	114,419	147,144	173,622
Total Commuters ¹	80,850	102,318	118,660

	Means of Transportation to Work		
	Percent of Total Working Population		
Car, Truck, or Van (drove alone)	72.9%	79.3%	79.1%
Car, Truck, or Van (carpooled)	17.1%	12.4%	12.6%
Worked at Home	3.6%	4.0%	3.5%
Walked	3.6%	2.4%	1.9%
Public Transportation ²	2.0%	1.4%	1.6%
Other Means (inc. bicycle)	0.8%	0.6%	1.2%

	Number of Vehicles Per Household		
	Percent of Total Households		
No Vehicle	5.7%	5.0%	4.3%
1 Vehicle	24.5%	25.2%	26.6%
2 Vehicles	42.6%	43.5%	41.1%
3 or more Vehicles	27.2%	26.4%	28.0%

		Mean Travel Time to Work		
	Minutes	27.3	31.9	33.8

Source: US Census 1990 & 2000, American Community Survey 2006

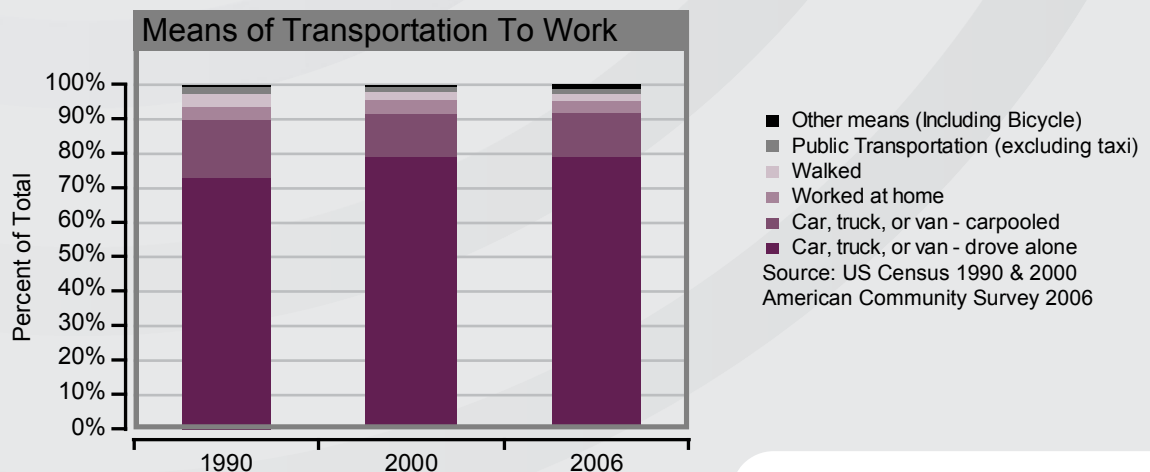
(1) Workers greater than 16 years old

(2) Excluding taxicab



Commuting to Work

- Of Frederick's 102,318 resident workforce (as of 2000), 42,046 (41%) worked outside of the County. This is a slight increase from 40% in 1990. Of these 42,046 out-commuters over half (22,867) worked in Montgomery County.
- For the approximately 84,731 jobs in Frederick County 29% (24,459) are filled by in-commuters who reside outside of the County. The greatest source of in-commuters is Washington County with 7,150 followed by Montgomery County with 4,104, and Pennsylvania with 3,978.
- With Frederick County's location at the junction of two interstates, I-70 and I-270 and two primary highways, US 15 and US 340 it bears the brunt of the increasing amount of commuting between the western and northern jurisdictions and points east of Frederick. The following table and maps highlight the level of commuting specifically from Pennsylvania, West Virginia, and Washington County, Maryland.
- The predominant mode of travel to work continues to be the automobile with a lone driver. The percentage of Frederick's workers driving alone increased from 73% in 1990 to 79% in 2006. Workers using alternative means of commuting including carpooling, transit, walking, and bicycling continues to decline from 23% to 17%.

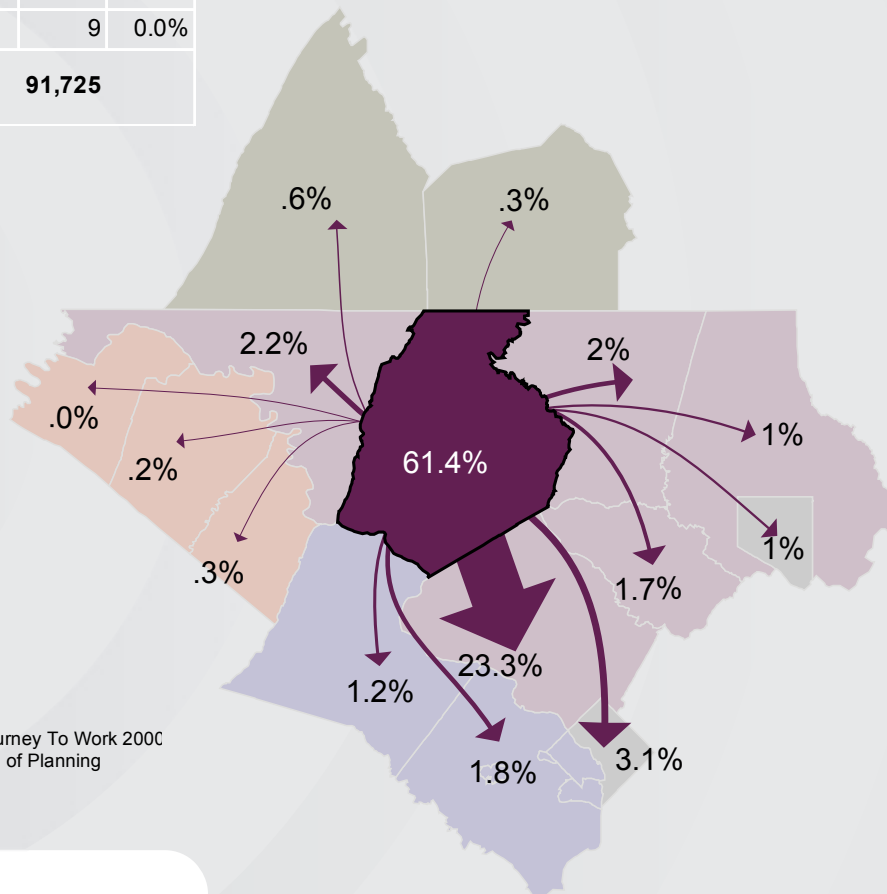


Frederick County, Maryland

Destination County/City	Destination State	Number of Commuters	% of Total Commuters
Washington D.C.		3,025	3.1%
Baltimore City	MD	960	1.0%
Baltimore	MD	951	1.0%
Carroll	MD	2,004	2.0%
Frederick	MD	60,272	61.4%
Howard	MD	1,646	1.7%
Montgomery	MD	22,867	23.3%
Washington	MD	2,153	2.2%
Adams	PA	293	0.3%
Franklin	PA	590	0.6%
Fairfax	VA	1,786	1.8%
Loudoun	VA	1,151	1.2%
Berkeley	WV	182	0.2%
Jefferson	WV	304	0.3%
Morgan	WV	9	0.0%
Total Commuters		91,725	

Commuting Patterns for Frederick and Surrounding Counties

- Frederick County, MD
- Adams County, PA
- Franklin County, PA
- Washington County, MD
- Jefferson County, WV
- Morgan County, WV
- Berkeley County, WV

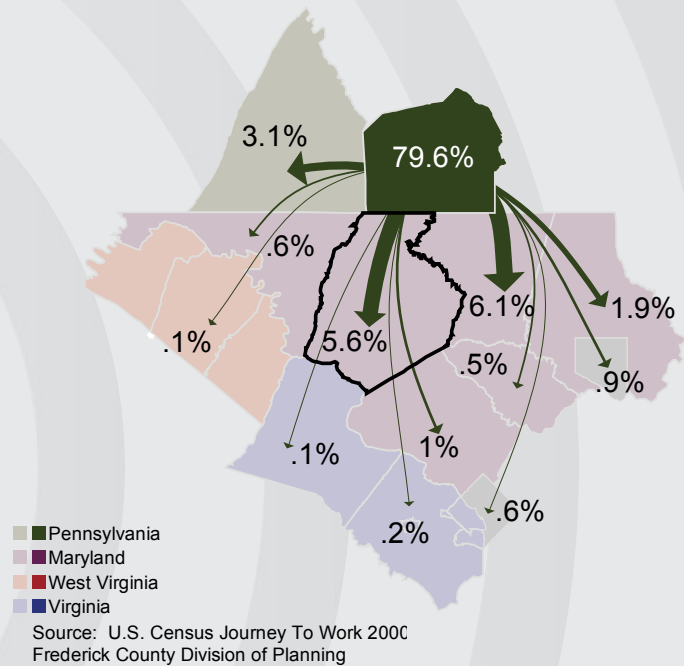


■ Pennsylvania
■ Maryland
■ West Virginia
■ Virginia

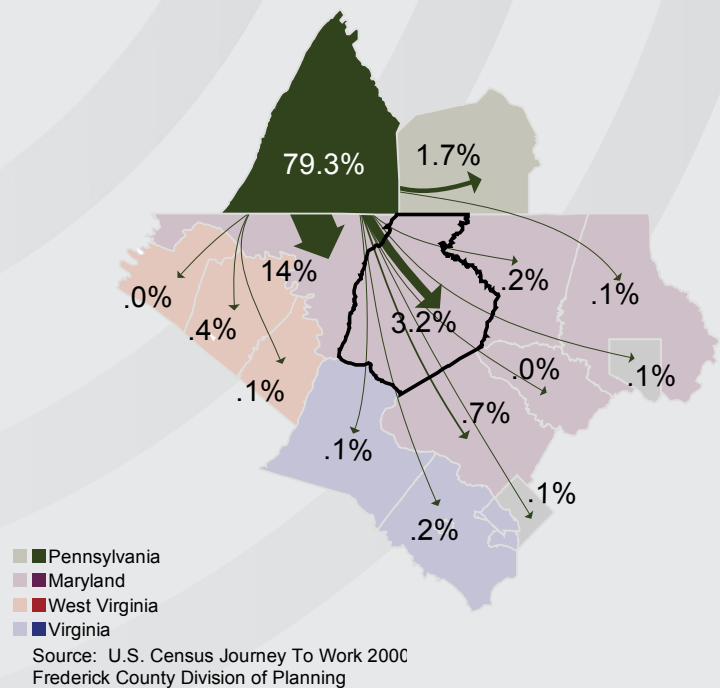
Source: U.S. Census Journey To Work 2000
Frederick County Division of Planning

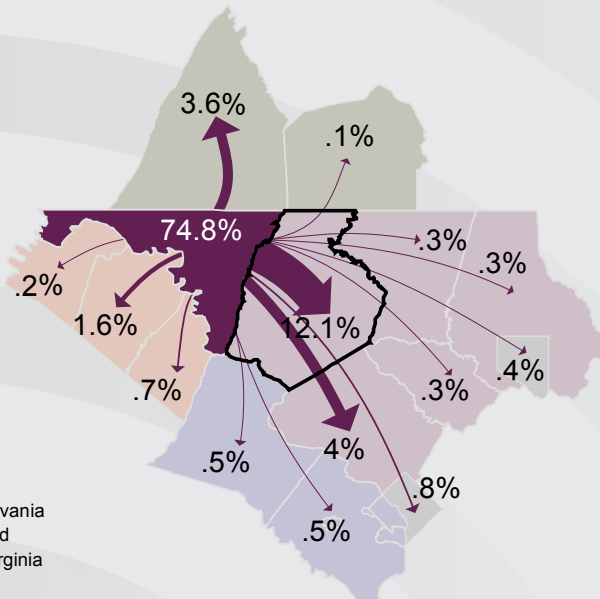


Adams County Pennsylvania			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
DC		91	0.3%
Baltimore City	MD	270	0.9%
Baltimore	MD	572	1.9%
Carroll	MD	1,867	6.1%
Frederick	MD	1,722	5.6%
Howard	MD	155	0.5%
Montgomery	MD	312	1.0%
Washington	MD	195	0.6%
Adams	PA	24,495	79.6%
Franklin	PA	962	3.1%
Fairfax	VA	66	0.2%
Loudoun	VA	22	0.1%
Berkeley	WV	28	0.1%
Total Commuters		30,757	



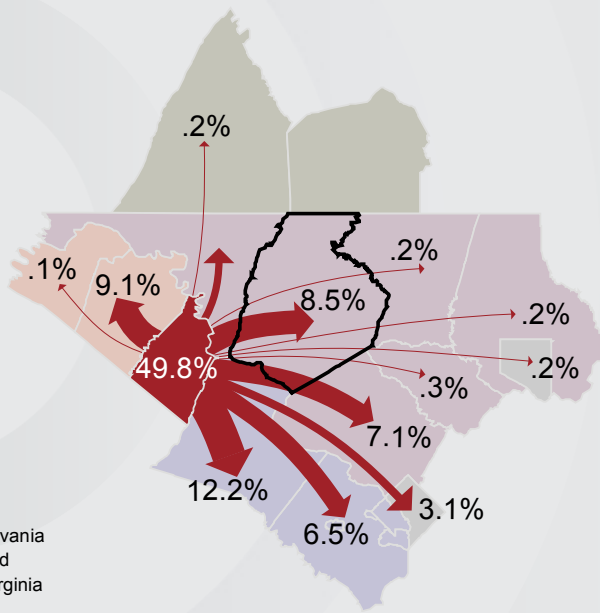
Franklin County Pennsylvania			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
DC		45	0.1%
Baltimore City	MD	40	0.1%
Baltimore	MD	29	0.1%
Carroll	MD	95	0.2%
Frederick	MD	1,789	3.2%
Howard	MD	7	0.0%
Montgomery	MD	374	0.7%
Washington	MD	7,841	14.0%
Adams	PA	948	1.7%
Franklin	PA	44,473	79.3%
Fairfax	VA	137	0.2%
Loudoun	VA	41	0.1%
Berkeley	WV	203	0.4%
Jefferson	WV	29	0.1%
Morgan	WV	6	0.0%
Total Commuters		56,057	





Source: U.S. Census Journey To Work 2000
Frederick County Division of Planning

Washington County Maryland			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
D.C.		474	0.8%
City of Balt.	MD	247	0.4%
Baltimore	MD	176	0.3%
Carroll	MD	164	0.3%
Frederick	MD	7,150	12.1%
Howard	MD	171	0.3%
Montgomery	MD	2,355	4.0%
Washington	MD	44,219	74.8%
Adams	PA	36	0.1%
Franklin	PA	2,140	3.6%
Fairfax	VA	284	0.5%
Loudoun	VA	268	0.5%
Berkeley	WV	920	1.6%
Jefferson	WV	402	0.7%
Morgan	WV	132	0.2%
Total Commuters		59,138	

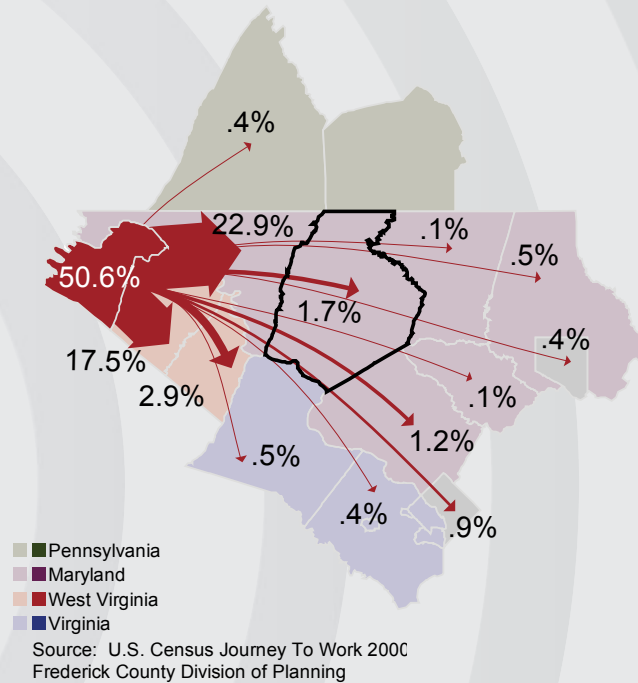


Source: U.S. Census Journey To Work 2000
Frederick County Division of Planning

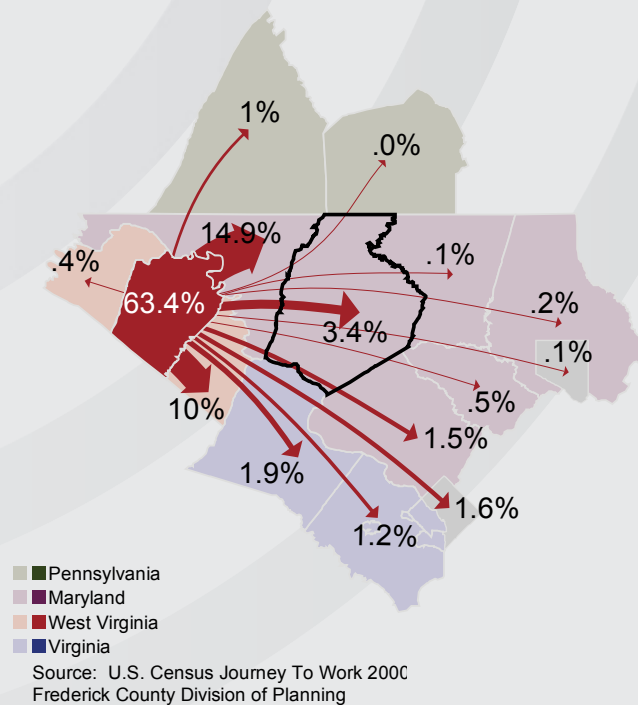
Jefferson County West Virginia			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
DC		592	3.1%
Baltimore City	MD	30	0.2%
Baltimore	MD	33	0.2%
Carroll	MD	39	0.2%
Frederick	MD	1,606	8.5%
Howard	MD	65	0.3%
Montgomery	MD	1,348	7.1%
Washington	MD	488	2.6%
Frankli	PA	34	0.2%
Fairfax	VA	1,241	6.5%
Loudoun	VA	2,305	12.1%
Berkeley	WV	1,725	9.1%
Jefferson	WV	9,452	49.8%
Morgan	WV	21	0.1%
Total Commuters		18,979	



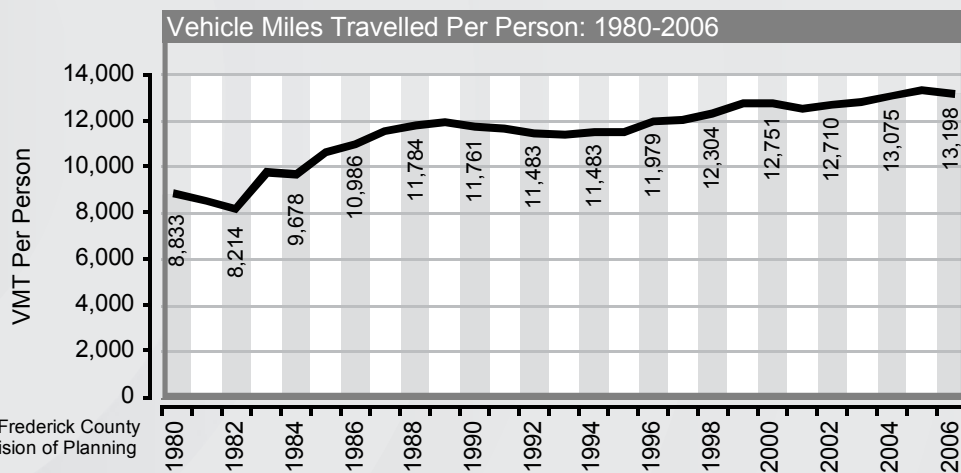
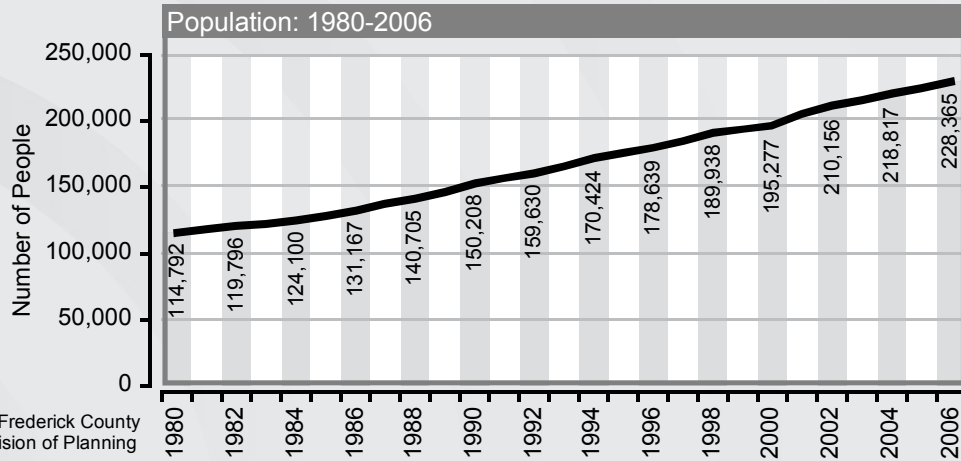
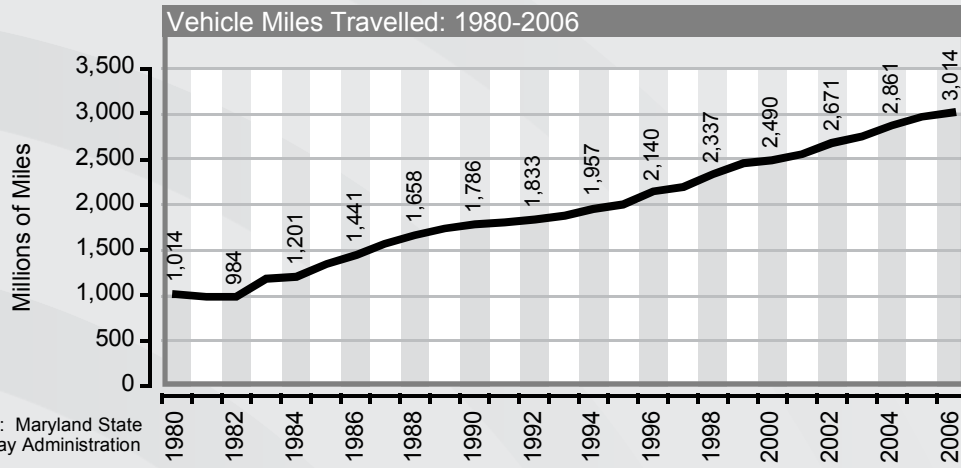
Morgan County West Virginia			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
DC		47	0.9%
Baltimore City	MD	20	0.4%
Baltimore	MD	23	0.5%
Carroll	MD	7	0.1%
Frederick	MD	86	1.7%
Howard	MD	6	0.1%
Montgomery	MD	59	1.2%
Washington	MD	1,166	22.9%
Franklin	PA	21	0.4%
Fairfax	VA	19	0.4%
Loudoun	VA	23	0.5%
Berkeley	WV	890	17.5%
Jefferson	WV	147	2.9%
Morgan	WV	2,571	50.6%
Total Commuters		5,085	



Berkeley County West Virginia			
Destination County/City	Destination State	Number of Commuters	% of Total Commuters
DC		503	1.6%
Baltimore City	MD	17	0.1%
Baltimore	MD	47	0.1%
Carroll	MD	28	0.1%
Frederick	MD	1,079	3.4%
Howard	MD	141	0.4%
Montgomery	MD	470	1.5%
Washington	MD	4,696	14.9%
Adams	PA	6	0.0%
Franklin	PA	308	1.0%
Fairfax	VA	365	1.2%
Loudoun	VA	604	1.9%
Berkeley	WV	20,031	63.4%
Jefferson	WV	3,158	10.0%
Morgan	WV	128	0.4%
Total Commuters		31,581	



Vehicle Miles Travelled Versus Population: Frederick County



Vehicle Miles of Travel (VMT)

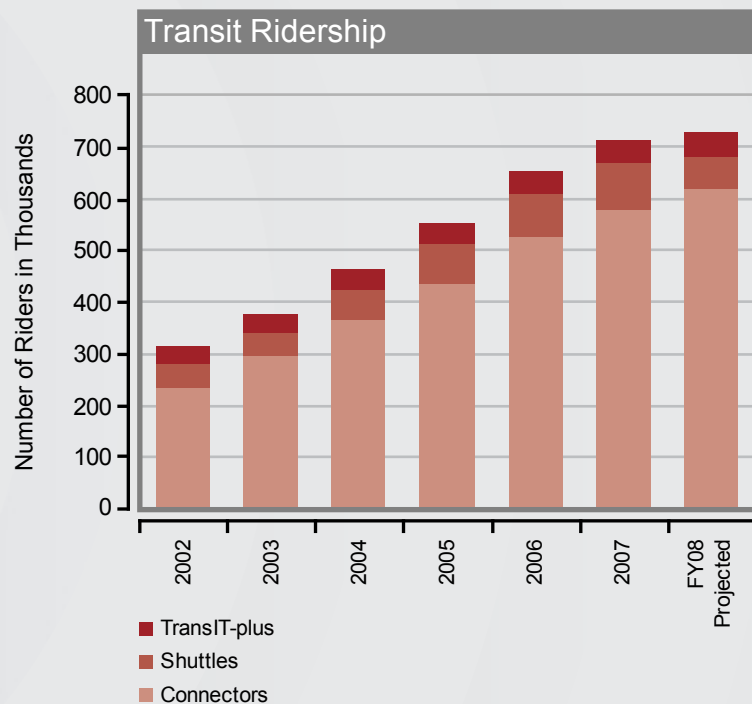
- Vehicle Miles of Travel (VMT) captures the total amount driving by all vehicles on the entire road network in a given time period and geographic area. This would include residents driving within the County as well as those who are just driving through the County. VMT can be used to provide a general indication of how driving continues to dominate how we get around.
- Since 1980 the County's total population increased by 99%, while the total VMT increased by 197%. The average annual population growth has been 2.7% versus an average annual VMT growth of 4.4%.
- This disparity in the growth rates between VMT and population can be attributed to a number of factors including: relatively cheap gas (not the case at present), lack of alternatives such as walking and transit, long commuting distances, and the spread out nature of our land uses that segregate the location of homes, school, shopping, and employment.
- As compared with the Metropolitan Washington Region, Frederick County's weekday VMT grew at an average annual rate of 3% versus 2.4% for the region as a whole.

Transit Ridership

- Average weekday transit ridership for the Metropolitan Washington Region grew at an annual rate of 3.5% between 2000 and 2006 compared to a VMT growth rate of 2.4% for the same period.
- This higher growth rate suggests a measurable modal shift from auto to transit for some daily trips. Some key factors responsible for this shift to transit include increased regional and local jurisdiction transit service, rising fuel costs, increased participation in employer-sponsored transit benefit programs, and increased population growth in areas well served by transit.



- Average weekday transit ridership in Frederick County grew at rate of over 15%.
- For the MARC service average daily ridership for the Frederick County stations has increased from approximately 1,320 in 2002 to 1,560 in 2007. While the Brunswick station continues to be the most heavily used station in the County the Frederick and Monocacy stations have experienced the greatest ridership increases since 2002 at 25% and 55% respectively.
- The 991 Commuter bus service, which serves Hagerstown and Frederick to the Shady Grove Metro station, has experienced a 15% increase in ridership in the past year alone.
- The County's TransIT Service ridership has increased at an average annual rate of 15% between 2000 and 2006. This ridership increase occurred with minimal increases in the route miles.



Source: Frederick County Department of Public Works and Transportation, TransIT Services



Libraries

- A library fee was added to the residential impact fee ordinance in 2001
- \$4.1 million has been collected and dedicated to library construction since 2001.

Book and Media Circulation

- 1995: FCPL circulated 924,815 items (all equipment and materials—books, audiovisual, etc)
- 2006: FCPL circulated 1,610,223 items
- 2008: As of February 2008, FCPL has circulated over 2,000,000 items
- Circulation has increased 59% since 2000.

Library Cards

- 1997: 81,000 people possessed library cards
- 2007: 120,000 people possess library cards
- 151% increase in the number of people who have library cards from 2000.

Library Facilities

- Since 1998, FCPL has constructed or remodeled five (5) facilities.

	Square Feet		Year Built / Renovated
	1998	2007	
C. Burr Artz Headquarters Library	29,000	67,000	2002
Brunswick Public Library	2,500	2,500	
Emmitsburg Public Library	2,700	5,000	2004
Middletown Public Library	2,500	2,500	
Thurmont Regional Library	2,100	25,000	2008
Walkersville Public Library	2,500	2,500	
Urbana Regional Library		25,000	2006
Edward F. Fry Memorial Library		450	2006

Public Schools

- In addition to pupil enrollment growth resulting from population growth, migration and new development, FCPS must be responsive to new federal requirements, state mandates or county-directed initiatives in terms of facility construction/expansion and other educational system provisions to provide quality education for all children.
- 1997 State-Rated Building Capacity
 - 22 students/class (Kindergarten)
 - 25 students/class (grades 1-5)
 - Kindergarten= ½ full-time student
- 2007 State Rated Building Capacity
 - 20 students/class (preK, Kinder.)
 - 23 students/class (grades 1-5)
 - Pre-K=1/2 full-time student
 - Kindergarten=full time student



- Pre-Kindergarten is now offered at 25 elementary schools
- State-mandated all-day Kindergarten (new in 2007-2008 school year) resulted in need for 57 additional classrooms.
- The Board of Education has approved policies to allow for developer-funded school improvements and additions to meet the Adequate Public Facilities Ordinance.

School Facility Trends

- 1997
 - 54 separate school buildings
 - 4 million square feet
 - 1,212 acres
- 2007
 - 66 separate school buildings
 - 5.8 million square feet
 - 1,400 acres

Elementary Schools

- 1997
 - 30 elementary schools
 - no primary schools
 - no charter schools
 - no pre-K
 - 16,928 total ES enrollment
 - 15,400 equated ES enrollment
 - 12 ES at or over 100%
 - 9 ES between 90% and 100%
 - 9 ES below 90%
- 2007
 - 37 elementary schools
 - 2 primary schools (Middletown, Thurmont)
 - 1 charter school (Monocacy Valley Montessori)
 - pre-K in 25 schools
 - 18,270 ES State Rated Capacity
 - 17,584 equated ES enrollment (a 2,184 student increase from 1997)
 - 14 ES at or over 100%
 - 13 ES between 90% and 100%
 - 10 ES below 90%



Elementary School Projections

- Enrollment at the elementary school level will increase by approximately 4,110 students between 2006 and 2016
- 5,488 elementary school seats will be needed during this time to establish a systemwide capacity rate of 90%
- Five new ES and additions to 9 schools totaling 4,687 seats during this time would result in a systemwide capacity rate of 93%

Middle Schools

- 1997
 - 10 Middle Schools
 - 7,903 MS enrollment
 - 7,723 MS system wide capacity (102%)
 - 4 MS at or over 100%
 - 3 MS between 90% and 100%
 - 3 MS below 90%
- 2007
 - 14 Middle Schools
 - 9,193 MS enrollment (1,290 student increase)
 - 11,000 MS system wide capacity (84%) (3,277 student capacity increase)
 - 1 MS at or over 100%
 - 5 MS between 90% and 100%
 - 8 MS below 90%

Middle School Projections

- Enrollment at the middle school level will increase by approximately 1,671 students between 2006 and 2016
- 1,093 MS seats will be needed during this time to establish a systemwide capacity rate of 90%
- New capacity projects for middle schools include additions to 4 schools totaling 1,050 seats



High Schools

- 1997
 - 8 High Schools
 - 9,530 HS enrollment
 - 9,399 MS system wide capacity (101%)
 - 5 HS at or over 100%
 - 1 HS between 90% and 100%
 - 2 HS below 90%
- 2007
 - 9 High Schools
 - 12,607 HS enrollment (3,077 student increase)
 - 12,223 HS system wide capacity (103%) (2,824 student capacity increase)
 - 5 HS at or over 100%
 - 2 HS between 90% and 100%
 - 2 HS below 90%

High School Projections

- Enrollment at the HS level will increase by approximately 791 students between 2006 and 2016
- 2,834 high school seats will be needed during this time to establish a systemwide capacity rate of 90%
- New capacity projects for high schools include 1 new HS (Oakdale), additions to 4 schools and 1 replacement (Linganore) totaling 3,207 seats, bringing the systemwide capacity level to 88%.

Parks and Recreation

Park Type	1998	2008	Increase
Neighborhood	325 ac.	831 ac.	506 ac.
Community ¹	1,289 ac.	1,841 ac.	552 ac.
District	362 ac.	1,045 ac.	683 ac.
Total Acres	1,976	3,717	1,741

¹ Includes a portion of middle school and high school acreage as recreational parkland



- As of January 1, 2008, Frederick County owns 30 sites (Community Parks, District Parks, Special Use Parks) totaling 1,578 acres.

	Existing County Parkland	Parkland Deficit Based on 2030 Projected Population of 326,224
Neighborhood	831 ac.	1,128 ac.
Community	1,841 ac.	1,899 ac.
District	1,045 ac.	3,491 ac.



The following issues are not meant to be an exhaustive list but to initiate an ongoing process that will continue throughout the Plan update process. These and other issues identified during the Plan update may be addressed through a number of opportunities including:

- identifying goals, policies
- proposing action recommendations
- through revisions to the land use plan or zoning maps

Agriculture

- Piecemeal agricultural preservation and urban expansion can result in a loss of resources and an inefficient use of land, either by creating conflicts between areas of urban expansion and rural areas or by the conversion of prime farmland to development.
- The conversion of land from rural development to urban development in areas where urban expansion is officially designated is often a source of conflict between different jurisdictional levels, property owners, and developers because there is no common understanding or expectation that growth will occur in those areas.
- Economic conditions, poor agricultural commodity

prices, and rising costs are slowly but substantially eroding small farm incomes in Maryland. Furthermore, forces such as globalization, industrialization, and development encroachment are threatening small farms. As a result, farm economies are diversifying by placing a greater emphasis on direct marketing such as agritourism.

- There are agricultural areas of the County that don't have the prime soils or significant agricultural preservation activity but nonetheless support the priority preservation areas and contribute to the rural/agricultural character of the County.
- Non-agricultural uses are being developed in the Agriculture zone use increasing amounts of productive agricultural lands.

The Environment and Green Infrastructure

- Development that consumes natural resources ultimately threatens the ability to maintain an interconnected infrastructure of natural features, such as stream valleys, wetlands, parks, forestlands and native plant habitat.
- Low density development patterns require more land, which may increase pressures to develop environmentally sensitive areas.
- Some communities in the County that rely on groundwater sources to supply their drinking water have experienced limitations and/or shortages in recent years. Communities will need to assess their carrying capacity and may need to identify alternative sources of drinking water and/or review alternative land use scenarios to adequately serve their population and meet State environmental policies. Private landowners with wells may also be affected.
- Even with the implementation of stormwater best management practices, land development continues to adversely impact our streams.



Infrastructure and Community Facilities

- Major infrastructure investments for existing communities are often located on the outskirts because of the availability of cheaper and larger tracts of land. This exacerbates the outward spread of communities and is a form of disinvestment in the existing built core. This is because the location of new development outside of the community center dilutes the concentration of services and activities and therefore prevents the experience of a social and economic vitality of these places.
- The timing of development in relation to the provision of infrastructure has been controlled primarily by the Adequate Public Facilities Ordinance (APFO) during the development review process. The County's Comprehensive Plan should be able to address the timing of development with the necessary infrastructure earlier in the planning process.

Historic Resources

- There are currently weak incentives and regulations in place to promote or protect the historic preservation of significant structures and property in the County. This can result in the loss of historic assets that are valuable to a community to the pressures of new development and growth.
- Historic preservation involves not just buildings, but also place. Even if historic structures are preserved, the historic character of a place can be lost, which may be just as important to the history and values of a community.
- Adaptive reuse of existing buildings can be expensive, difficult to convert to new uses because of physical constraints, and is a type of development with which most developers have little experience. Therefore, adaptive reuse is not commonly



preferred in the development industry without regulatory incentives to offset the expense of this type of development.

Growth Management and Design

- Frederick County is part of one of the most dynamic metropolitan regions in the country with continued job growth that in turn attracts new residents to the region. Yet there is the pervasive assumption that Frederick County should not grow, which impedes the ability of the community to focus on how we should grow.
- Managing growth by concentrating development into existing or new communities and preserving rural areas requires the application of a higher density pattern of development. There is controversy surrounding the issue of the density of development because it has a great impact on public health, quality of life, and fiscal management and the understanding of density is strongly tied to social values and personal background. Higher density patterns of development can pose as many problems as advantages. Community design is an important factor for insuring higher density development is advantageous.
- Areas of lower density development will still be built in the County based on approved subdivisions, lots of record, or other development rights.
- Focusing growth into existing communities by increasing density, taking advantage of existing services and infrastructure, and employing density-friendly urban design and preserving rural areas requires the application of a higher density pattern of development.
- Redevelopment and revitalization opportunities need to be identified.
- A lack of balance between the application of general planning principles and categories and an ad hoc approach that considers the specific factors



affecting each community can minimize the effectiveness and negate the objectives of the plan.

- With the close proximity of two major economic centers such as Washington D.C. and Baltimore, Frederick County has historically functioned in part as a bedroom community. An increase in the number of jobs available in the County increases the jobs to housing ration and promotes a more diversified economy.
- The two major markets at play in Frederick County are biotech and general industrial. Biotech is a growing industry that is focused in Frederick because of the presence of Fort Detrick. In addition, Frederick County has many resources, such as connections to major rail corridors that promote general industrial activity.

Transportation and Accessibility

- Traffic is getting worse in the County. Total vehicle miles travelled are increasing at a faster rate than population growth, which means people are driving more. We will not be able to build enough roads soon enough to ever provide significant relief to congestion.
- Our land use and development patterns are still oriented to segregated land uses and disconnected street networks that create impediments to walking, bicycling, or supporting transit use.
- The need to focus on a balanced, multi-modal approach to transportation that emphasizes mobility for people not just automobiles.

